

# Jonathan H. Tully

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## SENIOR MANAGEMENT EXECUTIVE – CONSULTING EXPANDED ACHIEVEMENTS SUMMARY

### **Business Development & Executive Client Relationships**

Distinguished by extraordinary, proven ability to deepen and extend practice reach and sales by cultivating trust, rapport, and credibility with senior executives, networking and bridging relationships to broaden industry reputation, and building upon global experience to create new markets.

Generated more than \$31.2 million in follow-on sales to existing clients and more than \$10 million in sales to newly penetrated clients over a period of 2-½ years, building and leveraging executive relationships and connections to transform strategy engagements into lucrative implementation engagements. Teamed as a primary player in all aspects of the sales process, from lead identification, relationship development, scoping and strategy, proposal development, client presentations, and pricing strategy through negotiations and closing.

- **\$13.2 million increase** in business with a major Wall Street securities firm – displaced competitors as trusted advisors, winning credibility and subsequent new business, to \$25 million total, by providing innovative thought leadership on business and operating models.
- **\$2.5 million increase** in business with a global asset management firm – developed CXO relationships within new account, expanding a small project into \$3.5 million sales to provide work on client’s top strategic initiatives.
- **\$15 million increase** in business with the wealth management division of a Wall Street securities firm – dislocated a major competitor, winning the trust and respect of client executives throughout execution of strategy engagement and securing follow-on technology and implementation engagements.
- **\$10.8 million in sales from new clients**, including \$7 million in work with a large U.K. securities firm and \$3.8 million in sales to a top 3 U.S. retail brokerage firm.

### **Thought Leadership & Practice Development**

Recognized as an innovator consistently capable of creating new ideas and solutions to meet the most complex and ambiguous client needs and challenges. Quickly crest the learning curve of unfamiliar subject matter, disaggregating problems and developing /executing strategies for solutions that add value to clients.

Built practice credibility, value, and offerings through creation and promotion of pioneering executive suite ideas, provocative new solutions and methodologies, and groundbreaking intellectual capital that open the doors to new engagements.

Established a competitive advantage that displaced entrenched competitors and stimulated sales with senior client executives through innovative solution sets that help clients increase share of the market, drive business growth, and deepen /enhance customer relationships and services.

- **Innovation & growth** – Opened the door to new industry markets and won access to senior executives at target clients through collaboration with Dr. XXXXXXX XXXXXX, co-author of bestseller “XXXXXXX,” in commercializing concepts of sustaining versus disruptive growth and innovation in business. Currently leading XXXXXXX’s Innovation & Growth Center.
- **Service & experience excellence** – Created materials that have become the core to solution sets within XXXXXXX’s customer strategy practice; provided leadership for execution of cross-industry study of market-leading service organizations and development of an end-to-end service excellence model and solution set.
- **Consumer behaviors** – Conceptualized and formulated industry point-of-view explaining behaviors of retail banking customers; spearheaded strategic analysis that identified industry-relevant consumer behavior drivers.
- **Account management and rewards** – Led expansion into new client business area as direct result of developing industry point-of-view and facilitating executive workshops on account management and rewards.

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- **Sales effectiveness** – Developed new ideas and strategic approaches for increasing sales effectiveness within private banks, retail brokerages, and wealth management firms.
- **Cross-business client management** – Formulated intellectual capital and practical implementation approach to managing client relationships across lines of business.
- **Global operating models and strategies** – Championed study that has cemented relationships with major asset management clients and served as foundation for solution involving globalization strategies and operations.

### Engagement Management & Delivery

Established track record of success leading strategy development and execution of complex, global transformational programs at market-leading banking, investment management, capital markets, brokerage, and insurance companies. Combine deep industry knowledge, strategic and operational experience, disciplined program management, and proven change management abilities to achieve clients' most strategic objectives.

Noted for consistent delivery of flawless, top-quality, on-time, on-budget, profitable engagements while creating a fun, rewarding, and collaborative work environment. Focused on engagements involving strategy and operations, organizational effectiveness, and customer and channel strategy.

- **Spearheaded dozens of engagements**, leading teams in strategy development and execution to navigate client businesses through change and transformation, including periods of rapid growth, global expansion, formation of joint ventures, acquisitions and mergers, start-up ventures, turnarounds, and business reorganization.
- **Led strategic global initiatives** based out of both Europe and the Americas, overcoming cultural and logistics issues to effectively guide and manage global teams spanning multiple geographies across 3 continents.
- **Fostered cross-business collaboration** in engagements, leading multi-disciplinary teams in both strategic and implementation engagements, adding value to clients through provision of cross-functional expertise.
- **Produced extraordinary and measurable results for clients**, managing development of high-quality deliverables that include competitive growth strategy, go-to-market and commercialization plans, sales and service delivery models, customer segmentation, channel strategy, global operating models, organizational designs and restructuring, operations strategy, M&A strategy, due diligence and integration, talent management strategies, change management and communications plans, and outsourcing strategy. Representative results include:
  - heightened and profitable growth
  - streamlined processes & systems
  - minimized risk exposure
  - strengthened competitiveness
  - improved customer relationships
  - enhanced service quality
  - expanded global exposure
  - optimized return on investments
  - stabilized/decreased costs

### People Development

Valued internally for commitment and contributions to developing staff; take an active leadership role as a counselor and coach to junior consultants, provide input and guidance on the firm's staffing process, and participate in staff recruitment and retention activities.

- **Selected to orchestrate the firm's people-related programs** within the tri-state region and serve as a focal point for staff issues, including mentoring, staffing, recruitment, training, networking, and issue resolution.
- **Selected to lead Xxxxxxxx University business analyst recruitment program** to target top corporate strategy students, develop campus relationships, recruit and onboard top candidates.
- **Sought out by top-talent within the firm to act as a counselor and mentor** based on personal professionalism, strategic nature of work, and commitment to people development. Repeatedly recognized as a role model and approachable senior manager skilled at promoting a spirit of teamwork and motivation.